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Board Document System

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USER GUIDE



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NATIONAL ENERGY BOARD

Government
Publication

Board Document System

MAY 1995

USER GUIDE



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Chapter 1

Introduction to the Board Document System

Welcome

The Board Document System (BDS) is an electronic search and retrieval database designed for public use. It provides online access to an expanding collection of National Energy Board publications. Whether you use the Board Document System for hearing preparation, research or to find out more about the regulatory process, this on-line database puts information at your fingertips. Currently, the BDS contains Reasons for Decision dating from 1985 and hearing transcripts from 1991. Access is available electronically from computer terminals at the Board's Calgary office or from remote locations, using a computer modem. Other document types may be added to the system in future, based on feedback received from external users.

About This Guide

The Board Document System uses software called TOPIC® to facilitate document search and retrieval. This guide is designed to introduce you to the system and help you to:

- Gain access via modem;
- Locate documents;
- Browse through a list of documents;
- Learn keyboard commands for TOPIC®; and
- Perform keyword searches and retrievals.

The TOPIC® User's Guide, available from Verity, Inc., describes how to use more advanced features. Please see Appendix IV - *Source Documents* for a complete reference.

How to Contact Us

If you need help or have questions about the Board Document System, please contact the NEB Help Centre at (403) 292-6967.

Chapter 2

Before You Start

Your Hardware and Software Needs

You will require the following hardware and software to use the Board Document System:

- A computer modem capable of operating at 300, 1200, 2400, 4800, 9600 or 19200 baud. (The baud rate is the speed at which information travels across telephone lines);
- A computer terminal that is VT100, VT102, VT220 or VT320 compatible; and
- A communications software package that supports these terminal emulations.

Obtaining a User Account

For security reasons, prospective users must set-up an account before using the Board Document System. To obtain a user account request form, contact the National Energy Board's Regulatory Support Office at (403) 292-4800. Once your completed form is returned to us, it will be processed and your account activated. Normally, it will take 24 hours to set-up your user account.

Your User Account

Your user account package will include:

- Your new login ID. It will identify you and prevent unauthorized access;
- Your password, a personal code that prevents unauthorized use of your Login ID;
- A User agreement, specifying terms and conditions, and
- A Board Document System User Guide, explaining how the system works.

Modem Settings

Please ensure that your modem is set-up according to the following specifications:

Data bits	8
Parity	None
Stop bits	1
Terminal emulation	VT100, VT102, VT220, VT320
Transmission speed	300, 1200, 2400, 4800, 9600, or 19200 baud
Handshaking	None or XON/XOFF

About Your Keyboard

Given the variety of computer terminals and communication packages currently in use, it is possible that your keyboard may interpret its keys differently than those in this guide. Consult your keyboard or communication software documentation to identify which keys perform similar tasks. For future reference, you may wish to record these keys on the following chart.

This guide	Definition	Your keyboard
Tab	Horizontal Tab	
Delete	Character Delete	
Home	The Home Cursor	
Cursor Up	Cursor Up (up arrow key)	
Cursor Down	Cursor Down (down arrow key)	
Cursor Left	Cursor Left (left arrow key)	
Cursor Right	Cursor Right (right arrow key)	
PgDn	Next Page	
PgUp	Previous Page	
Enter	Enter key or Return key	
Esc	Escape	
End	End Key	
Backspace	Backspace key	

Chapter 3

Access to the Board Document System

Access Options

There are three different ways to access the Board Document System. The method you choose will depend upon what is most convenient for you. The choices are:

- Personal computer access from the Board's library;
- Personal computer access from the Hearing Satellite room; and
- Remote dial-in access.

Personal Computer Access from the Library

There are two personal computers located in the National Energy Board library in Calgary that are dedicated to the Board Document System. These machines are always logged in using a library account. For this reason, you will not need to use your own login ID and password. These dedicated computers will be running in a Microsoft® Windows™ environment.

Personal Computer Access from the Satellite Room

There are six personal computers located in the Hearing Satellite room at the National Energy Board's Calgary office, 311 Sixth Avenue S.W.

To access the Board Document System from these personal computers you will need to:

- Enter your login ID; and
- Enter your password.

Once connected from the Satellite room, the system will run in a Microsoft® Windows™ environment.

Note: Access to the Satellite room is only available during on-site hearings in Calgary. Its designated location for each hearing will be communicated to the public.

Dial-in Access

To obtain dial-in access to the Board Document System (see Chapter 2), you require a modem and communications software. Before you start:

- Verify that your computer and modem are connected properly;
- Ensure your communications software is properly installed; and
- Confirm that your modem is using the settings listed on page 2.

The dial-in system uses a character based (UNIX™) environment. This means that commands in the system are based on the keyboard and not the mouse.

How to Reach the Board Document System

Using your communications software and modem, dial (403) 299-3353. When the Board Document System answers your call, you will see:

```
Authorized use only!  
nebone1 [HP Release A.B9.04]  
login:
```

Note: If you are dialing long distance, phone company charges apply once the Board Document System responds to your call.

Logging into the BDS

At each step of the login process you will be prompted for typed commands.

- At **login:**, type your login ID and press the **Enter** key (or your keyboard equivalent); and
- At **password:**, type your password and press the **Enter** key.

Selecting Your Terminal Type

As you log in, the host computer system automatically detects your terminal type. If you have problems, be sure your communications software is set to emulate one of the terminal types specified on page 3.

Leaving the BDS

From the Library

Exit the TOPIC® program. Leave the computer at the login prompt.

From the Satellite Room

Select **Exit** from the **File** menu to exit the TOPIC® program and then exit all other active applications. Exit from Windows™ Program Manager by selecting **Exit** from the **File** menu. The BDS automatically logs you out of the system.

From Dial-in

Select **Exit** from the **File** menu to exit the TOPIC® program. After you have exited from TOPIC®, the BDS automatically logs you out of the system and hang up the telephone line.

Chapter 4

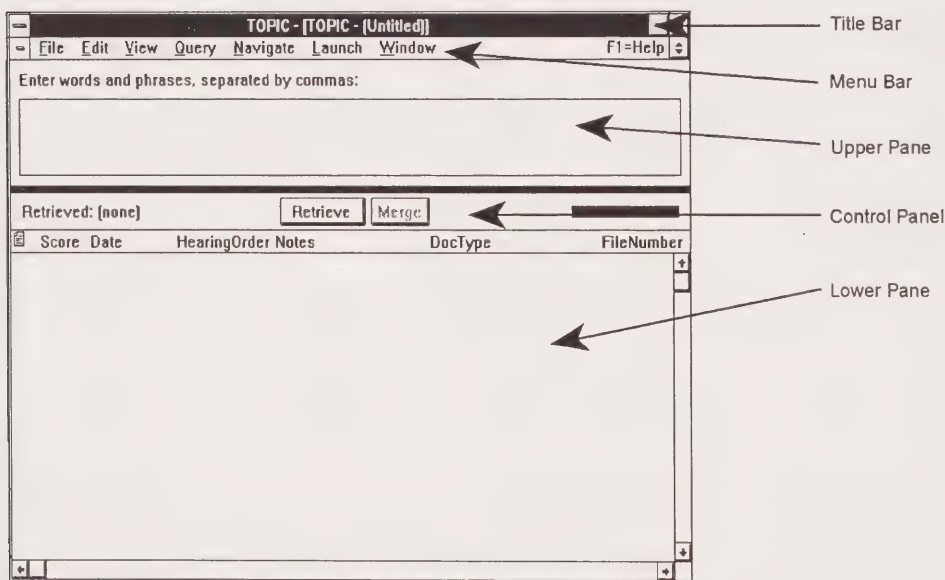
Working with TOPIC®

TOPIC® Windows

The Board Document System uses TOPIC® software, a technology that adds intelligence and flexibility to your document retrievals. TOPIC® can perform simple searches for words or phrases, as well as broader searches based on interrelated concepts and ideas.

When started, TOPIC® typically displays a default window called a Simple Query Window. Directions on page 13 show how to find the Simple Query Window if it is not already displayed. The basic elements of a window are common to all types of queries. These elements are briefly described on the following page. Note: Diagrams below are based on the Windows interface that appears on system terminals in the Board's library or satellite office. The interface for dial-in access has similar features, but is tailored to keystroke, rather than mouse, commands.

Figure 1
Basic Window Elements



Title Bar

The title bar displays the name of the query. When you open a new query, TOPIC® assigns the query a name. When you save a query, you have the option of renaming it so that the next time you open the query, the new name appears in the Title Bar.

Menu Bar

The menu bar contains the primary command groupings. Commands are grouped under a menu bar title according to subject or task similarities.

Upper Pane	The upper pane contains a simple query edit box in a Simple Query window, a form query template in a Form Query window, and a topic query editor in a TOPIC® Query window. In the upper pane of the query window you specify the search criteria for the query using words, phrases, and/or topics.
Control Panel	The control panel contains elements used to monitor the progress of a retrieval. The control panel appears in the top section of a query window. Elements in the control panel are: the Retrieved indicator, the Merge indicator, and the Processed bar.
Lower Pane	The lower pane contains the Results List where header information about retrieved documents is displayed. When you open a new query, this area is blank until you start a retrieval.

Starting TOPIC®

TOPIC® appears on-screen automatically once you complete the login procedure. Please note that your communications software may interpret keystrokes as its own specific commands rather than TOPIC® commands. Should you encounter this problem, refer to your communications software manual or contact your communications software support office for assistance.

Retrieving Documents

TOPIC® allows you to open many queries simultaneously, and the mix of open queries can include all three query types: Simple, Form and Topic. For simplicity, this document will discuss only Simple and Form queries. Each of the open queries occupies a specific window type and structures information in a slightly different way. Simple queries, for example, are good for arranging information in command strings, while Form queries organize information according to pre-selected categories. The query type you choose is a matter of preference and does not affect retrieval results. Topic queries are discussed in Verity, Inc.'s TOPIC® User's Guide (see Appendix IV).

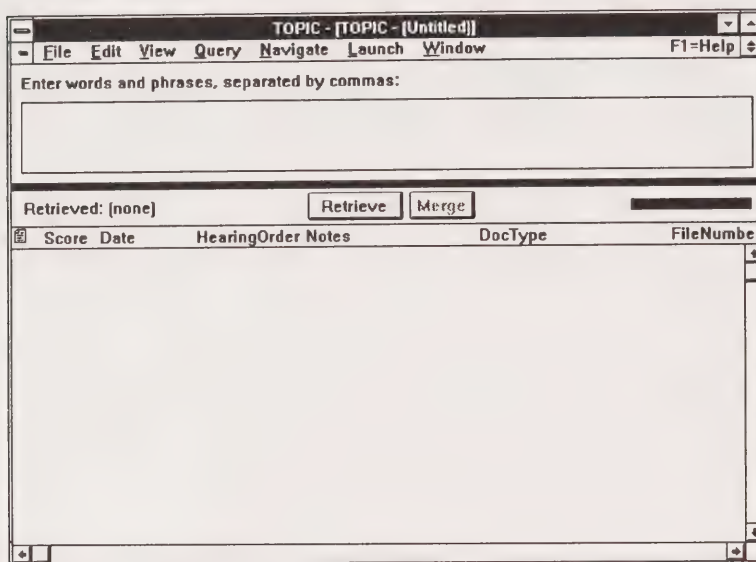
Simple Queries

A Simple Query is the easiest type to use. A Simple Query window contains an edit box in the upper pane of the window, a control panel in the centre, and a results list in the lower pane. The edit box is where you enter the words and phrases that define your query. The control panel contains a **Retrieve** button which can be used to start your retrieval. The Results List is where the retrieved documents are displayed as TOPIC® performs the retrieval.

In a Simple Query window, you can open a new or an existing query. When you open a new Simple Query, a blank Simple Query window is displayed. When you open an existing query, the previously entered search criteria are displayed in the upper pane of the displayed query window.

The following diagram illustrates what you see when you open a new simple query.

Figure 2
Simple Query Window



Opening a New Simple Query

The Simple Query window is what you usually see when starting TOPIC® (see Figure 2). If it is not visible, it can be selected by using the following steps:

- Select the **New Query**¹ option from the File menu; or
- Select the **Simple Query** option from the Query menu.

Viewing the Results List from a Simple Query

The Results List appears in the lower pane and can be scanned by scrolling up or down. The list is used to select a document and retrieve it for viewing.

Sorting Results

The Board Document System sorts your Results List alphabetically by document title, unless otherwise specified. You may prefer instead to sort results according to date, relevance ranking (most relevant documents first) or other criteria. To use the Sort feature, choose View from the Menu Bar and select the Sort option. You will see a screen with two windows: Available Fields, a list of all possible sort selections, and the Sort By list identifying the existing sort selection.

¹ **New Query** opens *another* query window without closing the current one.
Simple Query changes the *current* query window into a Simple Query window.

To change your sort criteria, move any unwanted selection from the Sort By window back to the Available Fields window by highlighting it (space bar in character based system; mouse in Windows® version) and selecting Move.

Any new sort criteria may be selected from the Available Fields window and placed in the Sort By window using the same technique. These results may be arranged in either ascending or descending order.

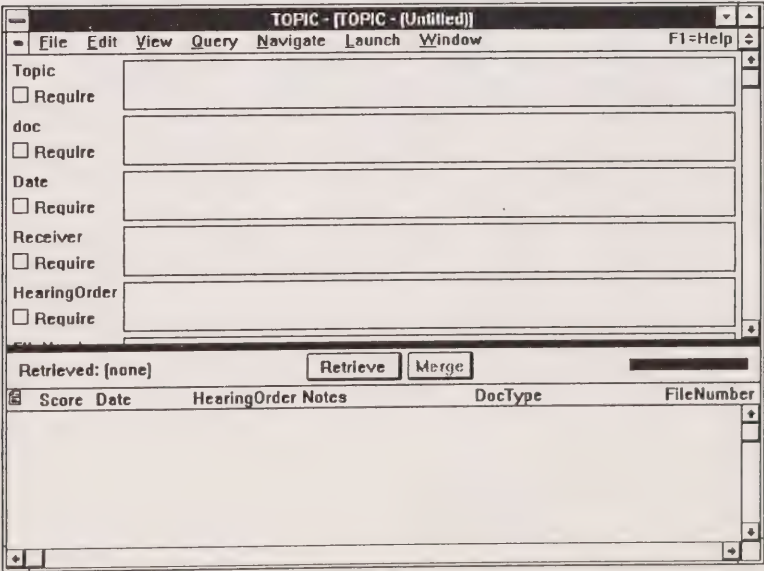
The Group option, which appears as you move selections, allows you to sort within sorted categories. For example, you might want to sort by date, then alphabetically within each date range. By choosing Date as your first criterion, then Title and selecting the Group option, you will get the desired results.

Form Queries

You can use a Form Query to search for documents using both predefined fields and the document's content. These predefined fields are listed in Appendix II. In a Form Query window, you can open a new or existing Form Query. When you open a new form query, a blank Form Query window is displayed; when you open an existing Form Query, the previously entered search criteria are displayed in the upper pane of the displayed Form Query window.

The following example of a Form Query window is displayed when you open a new Form Query.

Figure 3
Form Query Window



Opening a New Form Query

To open a new Form Query window:

- Select the **New Query**¹ option from the File menu; or
- Select the **Form Query** option from the Query menu.

A Form Query window will be displayed. Fields are described in Appendix II, Field Information.

Using the Require Checkbox

You can use the Require check box to indicate that a document must match the search criteria specified for each field. Using a Require check box is necessary when two or more fields are used in the form query template. If the box is not selected, the search will match either of the selected criteria, rather than both.

Example: "GH-5-93" in Hearing Order field and "Shell Canada" in Originator field. When the require checkboxes are selected, only documents making reference to both Shell Canada and the GH-5-93 hearing are retrieved. When it is not activated, all documents making reference to either GH-5-93 or Shell Canada are retrieved. The require checkbox is discussed in more detail in Verity, Inc.'s TOPIC® User's Guide (see Appendix IV).

Saving a Query

You may find that you use certain queries to regularly perform specific retrievals. Rather than entering the same query details each time, you can conveniently save a query to be opened and run later. When you save a query, you also save the sources that were used by that query, and the sort order used for your retrieval (default or personalized).

Using the "Save As..." Option

To save a query to a named file for later use:

- Select the **Save As...** option from the File menu. The Save File dialog box will appear.
- Enter the name you wish to use to identify this saved query in the Filename edit box. The name you assign can be up to eight characters long. Be sure to use the .QRY extension at the end of the file name.

¹ **New Query** opens *another* query window without closing the current one.
Form Query changes the *current* query window into a Form Query window.

Using the "Save Query" Option

If you have opened an existing query that you have subsequently edited, you can replace the original version with the edited version by doing the following:

- Select the **Save Query** option from the File menu.

When this option is selected, the original query is replaced with the edited version.

Working with Queries

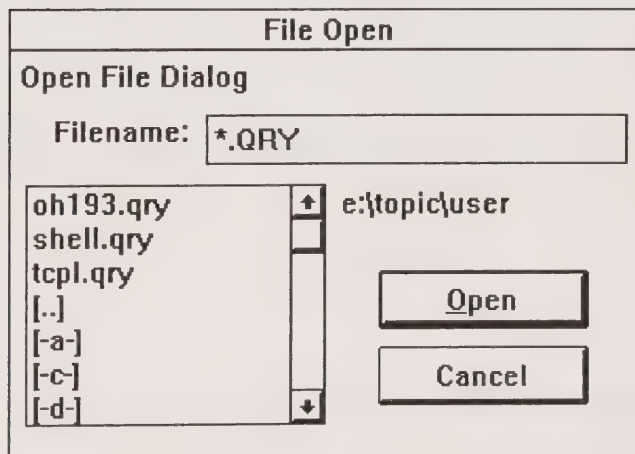
Opening an Existing Query

To open an existing query:

- Select the **Open Query...** option from the File menu.

The following example of an Open Query dialog box will appear. It includes a list of previously saved queries and directories as shown below.

Figure 4
Open Query Dialog Box



From this list you can open a file by using one of the following methods:

- Use the Tab key and Arrow keys (or mouse) to position the cursor over the name of a saved query, then use the space bar to select it; or
- Enter the path and filename of a saved query if it is not included in the list in the Filename edit box.

TOPIC[®] automatically starts a search using the selected query and fills the Results List with the documents retrieved.

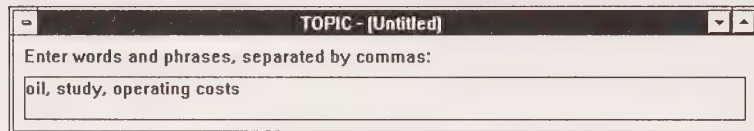
Refining a Query

Once you have run retrievals using a Simple or Form query, you may wish to refine your query to narrow your retrieval results. You may edit the values in a query template to restate your criteria and then run another retrieval. Note that when you save a query, TOPIC[®] saves the query's search criteria to a query file.

Sample Queries

For example, you may enter the following information in the Simple Query edit box:

Figure 5
Example Simple Query

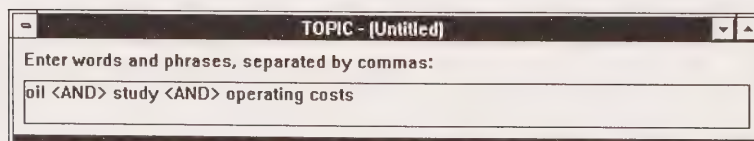


The screenshot shows a window titled "TOPIC - (Untitled)". Inside the window, there is a text area with the prompt "Enter words and phrases, separated by commas:". Below the prompt, the text "oil, study, operating costs" is entered in the text area.

Your query definition may be as brief as a single word or contain several words and phrases. Multiple words and phrases can be specified in many ways. Separation by commas is the simplest. When multiple words and/or phrases are separated by commas, TOPIC[®] will retrieve those documents which contain references to any of the words or phrases. That is, commas are treated as OR operators.

For more complex queries, several TOPIC[®] operators are available. For example, you could use the AND operator and formulate a query as shown below.

Figure 6
Example: Using 'AND'

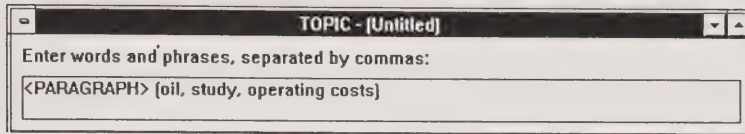


The screenshot shows a window titled "TOPIC - (Untitled)". Inside the window, there is a text area with the prompt "Enter words and phrases, separated by commas:". Below the prompt, the text "oil <AND> study <AND> operating costs" is entered in the text area.

For this query, only the documents containing reference to all of the words and phrases will be retrieved.

There are operators which add constraints to the proximity of the words. Consider the following query:

Figure 7
Example: Other Operators



A screenshot of a software window titled "TOPIC - [Untitled]". Inside the window, there is a text input field with the prompt "Enter words and phrases, separated by commas:". Below the prompt, the text "<PARAGRAPH> {oil, study, operating costs}" is entered into the field.

This will limit the retrieval to documents which contain all three words/phrases in the same paragraph.

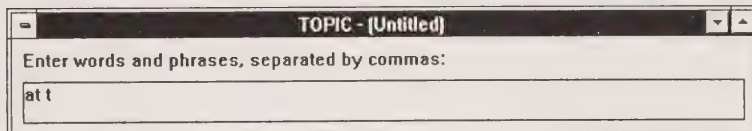
Punctuation in Queries

You must be careful when formulating queries to search for words or phrases which contain punctuation. Punctuation includes periods, commas, parentheses, apostrophes, etc. (e.g.: . , [] () ' & /).

When adding documents to the database, TOPIC[®] ignores all punctuation.¹ Therefore, when formulating your queries, you must leave out punctuation.

For example, if you wanted to find all documents which contain references to *AT&T*, you would formulate your query as:

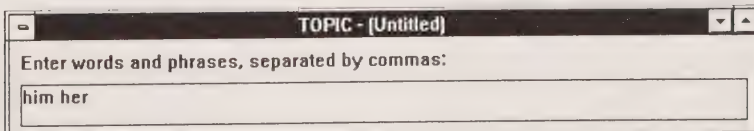
Figure 8
Query Punctuation



A screenshot of a software window titled "TOPIC - [Untitled]". Inside the window, there is a text input field with the prompt "Enter words and phrases, separated by commas:". Below the prompt, the text "at t" is entered into the field.

Similarly, if you wanted to find references to *him/her*, you would formulate your query as:

Figure 9
Query Punctuation



A screenshot of a software window titled "TOPIC - [Untitled]". Inside the window, there is a text input field with the prompt "Enter words and phrases, separated by commas:". Below the prompt, the text "him her" is entered into the field.

¹ There is one exception to this rule. Periods are recognized when not followed by white space. White space includes spaces, tabs and carriage returns.

When followed by white space, TOPIC® considers the period, exclamation mark, and question mark to be sentence terminators. Thus, it is not possible to search for a phrase such as *Mr. Smith* since TOPIC® considers it to be two sentences. Phrases start and end in the same sentence. Periods not followed by white space, such as in numbers (e.g. 123.99), become part of a word. Thus, if you wanted to find all documents which made reference to Section 5.3(b), you could formulate the following query:

Figure 10
Query Punctuation

TOPIC - (Untitled)

Enter words and phrases, separated by commas:

Section 5.3 b

TOPIC®'s response to punctuation requires that you be aware of its idiosyncracies. After sufficient usage, however, you will understand TOPIC® requirements and become comfortable with them.

Looking at Documents

Retrieved documents are displayed in the Results List of a query window. Documents may be grouped by Title, Date or some other value. A group of documents is represented by a folder icon. A single document is represented by a document icon.

Figure 11
Results List

TOPIC - (TOPIC - (Untitled))

File Edit View Query Navigate Launch Window F1=Help

Enter words and phrases, separated by commas:

interest <AND> gas

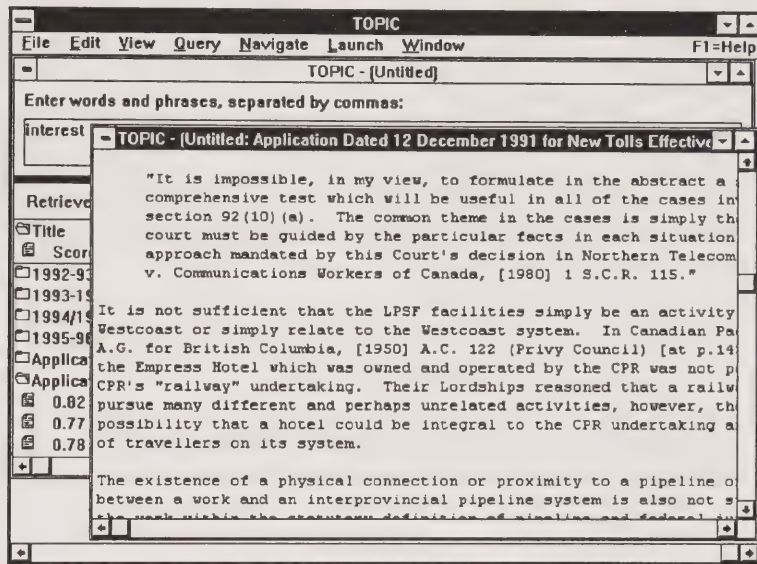
Retrieved: 1647 of 6978 [Src] Retrieve Merge

Title	Score	Date	HearingOrder	Notes	DocType	FileNumber
1992-93 Facilities Application						
1993-1994 Facilities Application						
1994/1995 Facilities Application						
1995-96 Facilities Application						
Application by TMPL for 1993 and 1994 Tolls						
Application Dated 12 December 1991 for New Tolls Effective 1 January 1992						
0.82 31-Jul-92 RH-1-92 Appendix 1	0.82	31-Jul-92	RH-1-92	Appendix 1	Reasons for Decision	4200-WQ
0.77 31-Jul-92 RH-1-92 Chapter 4	0.77	31-Jul-92	RH-1-92	Chapter 4	Reasons for Decision	4200-WQ
0.78 31-Jul-92 RH-1-92 Chapter 5	0.78	31-Jul-92	RH-1-92	Chapter 5	Reasons for Decision	4200-WQ
0.80 31-Jul-92 RH-1-92 Chapter 6	0.80	31-Jul-92	RH-1-92	Chapter 6	Reasons for Decision	4200-WQ
0.78 31-Jul-92 RH-1-92 Chapter 8	0.78	31-Jul-92	RH-1-92	Chapter 8	Reasons for Decision	4200-WQ
0.79 31-Jul-92 RH-1-92 Chapter 11	0.79	31-Jul-92	RH-1-92	Chapter 11	Reasons for Decision	4200-WQ
Application dated 14 July 1986 for new tolls effective 1 January 1987						

The Results List in your TOPIC® window may differ slightly from the diagram above. The ordering of documents in the Results List can be changed by choosing **View/Sort...** from TOPIC®'s main menu.

To view a retrieved document which is itemized in the Results List, simply highlight the document and press your enter key (if using a mouse, double click on the document icon). A document window will appear containing the document's text.

Figure 12
Document Display



The words which match your query definition are highlighted. You can jump from highlighted word to highlighted word by choosing **Navigate/Next Highlight** or using the keyboard equivalent.

Text can be viewed using the scroll bar. You can also use the arrow keys or Page Up and Page Down to move around within a document.

When you are finished viewing a document, close it by selecting Close from the file menu or pressing the Esc key.

HyperLink® Connections

A HyperLink® is like an automated cross reference. Hyperlink connections allow you to display material attached to specific documents in the database. These connections may consist of notes that have been attached to the document, graphic images, tables, or portions of other documents associated in some way with your current document.

An icon that identifies the type of HyperLink® connection is displayed wherever an attachment is placed. When you position the cursor over the icon and select the **Open Link** option from the File menu, you can display the information associated with the HyperLink® connection.

Using HyperLink® Connections

When in a document, the next occurrence of a HyperLink® connection can be located by choosing **Next Link** from the **Navigate** menu. A Hyperlink® connection can be opened three ways:

by highlighting the link and pressing enter, double-clicking on the icon or selecting **Open Link** from the File menu.

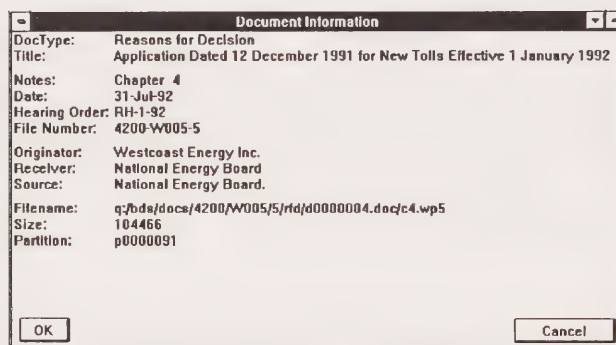
Image View

When viewing an image through a HyperLink® connection, a utility called VifView starts up. This program gives you several options for using the displayed image, such as printing, copying, zooming and rotation of the image.

Document Information

Once TOPIC® retrieves a document, you can get information on the document by using the **Get Info...** option from the **File** menu. **File/Get Info...** will only be active if you highlight a document in the Results List or activate an open document window. **Get Info...** will display a dialog box similar to the one shown below.

Figure 13
Document Information



When you are finished viewing the document information displayed in the dialog box, select the **OK** or **Cancel** button to close it.

Creating Output

Library or Satellite Room Only

Document printing is available at the Board's Library or Satellite room. It is not possible to save to floppy disk or to do file transfer from these locations.

After TOPIC® retrieves documents for a query and the retrieval results are presented in the query's Results List, TOPIC® provides two print options:

- Print the document as it appears in the document window; or
- Print the query's set of retrieval results as it appears in the query's Results List.

Printing Documents

You can print a document displayed in the Results List as it appears in a document window by performing the following steps:

- Select the document to be printed from the Results List or display it in a document window.
- Select the **Print...** option from the File menu and then click on **OK**.

Printing Query Results Lists

When retrieval results are presented in a query's Results List, you can print these results as they appear in the query window. You do this as follows:

- Display a query.
- Select the **Print...** option from the File menu and then click on **OK**.

Printing Images

Images can be printed while they are being viewed with VifView by doing the following:

- Display the image you want printed.
- Select **Print Full Image** from the File menu.

Printing from WordPerfect®

Any document you can retrieve with TOPIC® may be launched directly into WordPerfect® and then printed using WordPerfect's Print function. TOPIC® makes the WordPerfect launch available when you highlight a document in the Results List or activate an open document window. Documents originally created with WordPerfect® retain their formatting codes (bold, font, etc.) and will look similar to the original document when printed. You may find printing from WordPerfect® preferable to printing directly from TOPIC®.

Transferring a Document

Currently it is not possible to download documents directly from the Board Document System to your computer. It is anticipated that this will be supported in a future release.

Exiting TOPIC®

When you are finished using the BDS with TOPIC®, you may exit the application by selecting **Exit from File** on the menu bar. You will be asked whether you want to save any open queries. If you have a complicated query, you may want to save it for future use. Otherwise, queries will be discarded as you exit the system.

Chapter 5

Keystroke Differences for Windows™ and Character Based (UNIX™) Environments

Keyboard

Specific keystroke sequences are used for navigation during a TOPIC® session. The following tables summarize the default key or keystroke sequence used to perform specific functions.

The National Energy Board supports two interfaces:

- a character based (Unix™) dial-in interface; and
- a Microsoft® Windows™ interface on site.

Note: The following tables show default keystrokes for TOPIC® menu selections. You will notice that some commands are case sensitive. For example, the default keystrokes for the "Add to Query" function, **Ctrl + V,a**, must be entered as follows: press and hold down the **Ctrl** key and press **Shift** and **V**, release the **Ctrl** key, then type **a**. The plus sign between keys means to press and hold down the first key while you press the second key. The comma (,) acts as a separator and should not be typed.

Table 1
Basic Function Keystrokes

Function	Character based (UNIX™)	Windows™
Run a query, open a document, open a selected menu, execute a menu option.	Enter	Enter ↵
Move cursor from window to menu bar.	Ctrl + \	Ctrl + \ or F10
Move cursor within windows, lists, menus, query windows and text.	Arrow keys	Arrow keys
Move cursor within dialog boxes, between fields in the form query window.	Tab or Ctrl + T	Tab
Move cursor between window panes.	Ctrl + T	F6
Highlight a retrieved document.	Space Bar	Space Bar
Page up through results or text.	PgUp (Page Up)	PgUp (Page Up)
Page down through results or text.	PgDn (Page Down)	PgDn (Page Down)

Menu Navigation

File

The File menu options allow you to perform tasks associated with files and windows, as well as exit the TOPIC® session. The following quick keys can assist in navigating the **File** menu.

Table 2
File Menu Quick Keys

Function	Character based (UNIX™)	Windows™
New Query	Ctrl + N	Alt + F3
Open Query	Ctrl + O	F4
Save Query	Ctrl + V,S	Ctrl + F7
Get Info	Ctrl + G	F5
Print ...	Ctrl + P	Shift + F10
Close	Ctrl + C or Esc	Ctrl + F4 or Esc
Exit	Ctrl + X	Alt + F4

Edit

The Edit menu options allow you to edit information displayed in TOPIC® windows. The following quick keys can assist in navigating the **Edit** menu.

Table 3
Edit Menu Quick Keys

Function	Character based (UNIX™)	Windows™
Delete Selection (Clear Document)	Delete	Shift + F4
Select All	Ctrl + A	Shift + F2
Add to Query	Ctrl + V,a	Ins or Ctrl + F2

View

The View menu options allow you to change the presentation of information such as topics, assists and retrieval results. The following quick keys can assist in navigating the **View** menu.

Table 4
View Menu Quick Keys

Function	Character based (UNIX™)	Windows™
Expand Document	Ctrl + V, [Ctrl + E
Collapse Document	Ctrl + V,]	Ctrl + C
Sort		Shift + F5

Query

The Query menu options allow you to define queries in the query window. The following quick keys can assist in navigating the **Query** menu.

Table 5
Query Menu Quick Keys

Function	Character based (UNIX™)	Windows™
Start Retrieval	Ctrl + R or Enter	Ctrl + R or Enter ←
Cancel Retrieval	Ctrl + V, .	Ctrl + X
Merge Results	Ctrl + E	Alt + F5
Assists	Ctrl + B	F2
Simple Query	Ctrl + V, 1	Alt + F1
Form Query	Ctrl + V, 2	Alt + F2
Topic Query	Ctrl + V, 3	Alt + F3
Query Options		Ctrl + F3
Choose Sources		Shift + F3

Navigate

The Navigate menu options allow you to navigate through a query's retrieved documents. The following quick keys can assist in using the features of the **Navigate** menu.

Table 6
Navigate Menu Quick Keys

Function	Character based (UNIX™)	Windows™
Next Document	Ctrl + V, '	F9
Previous Document	Ctrl + V, ;	F8
Next Highlight (Query Occurrence)	Ctrl + V, >	Shift + F9
Previous Highlight (Query Occurrence)	Ctrl + V, <	Shift + F8
Next Link		Ctrl + F9
Previous Link		Ctrl + F8
Find Text	Ctrl + F	Ctrl + F

Window

The Window menu options allow you to change the query window display format, reposition the cursor between panes of a query window and display other windows which may be currently open. The following quick keys can assist in using the features of the **Window** menu.

Table 7
Window Menu Quick Keys

Function	Character based (UNIX™)	Windows™
Flip Windows	Ctrl + V, F	Ctrl + F5
Next Pane	Ctrl + T	F6

Help

The Help menu option allows you to display help text for a specific window type. The following quick key can help in obtaining this facility.

Table 8
Help Menu Quick Keys

Function	Character based (UNIX)TM	WindowsTM
Help on Window	Ctrl + Y	F1

Chapter 6

Tutorials

Creating a Simple Query

1. Open a Simple Query Window.
2. Select the upper pane in the Simple Query Editor.
3. Type the word **MOVIE**.
4. Select **Retrieve** in the window control panel.

TOPIC® will retrieve all documents that contain words using the word **MOVIE** as a stem. These documents are displayed in a Results List in the lower panel.

Reviewing the Results List for a Simple Query

1. Select the Document Group titled **Application for Tolls effective 1 January 1993**.
This will open a list of Documents attached to this document group.
2. Select the document called **RH-2-92 Volume 21**.
3. Use the **Shift + F9** keys to scroll through the document, locating occurrences of the search parameters, **MOVIE**.

Creating a Form Query

1. Open a new Form Query.
2. Select the upper pane to place the mouse in the Form Query Editor.
3. Type the word **MOVIE** in the field called DOC.
4. Select **Retrieve** in the window control panel.

TOPIC® will retrieve all documents that contain words using the word **MOVIE** as a stem. These documents are displayed in a Results List in the lower panel.

You should notice that the results are the same as the Simple Query in exercise 3.

STEM as a Search Operator

When operators are used, the operator itself is enclosed in angle brackets, i.e. the greater than and less than symbols <OPERATOR>. There are a few operators such as STEM and WORD operators that have other optional command forms.

1. Open a Simple Query by selecting **Simple Query** from the Query menu.
2. Select the **Simple Query Editor** in the Upper pane.
3. Edit the Simple Query Editor until it reads as follows:

HEAD and press **Enter**.¹
4. Select the Document group called **Blackhorse Pipeline Extension and Associated Facilities** and then the document called **GH-R-1-92 Volume 3**.
5. Use the **Shift + F9** keys to scroll through the document, viewing all cases of this word as a stem. You will know you have reached the last case in a document because your computer will beep.
6. Press **Esc**.
7. Repeat step 4 for **GH-R-1-92 Volume 5**.
8. Repeat step 5.
 Note in particular the number of documents retrieved. **This search will have retrieved words with "head" as a stem, such as header, heading, heads, and headed.**

WORD as a Search Operator

1. Return to the **Simple Query Editor** by pressing **Esc** and click in the Upper pane.
2. Edit the current query until it reads as follows:

<WORD> HEAD and press **Enter**.²
3. Select the Document group called **Application Dated 21 December 1990 for Tolls** and then the document called **RH-1-91 Chapter 5**.
4. Use the **Shift + F9** keys to scroll through the document, viewing all cases that match this search.

WILDCARD as a Search Operator

1. Return to the **Simple Query Editor** by pressing **Esc** and select the Upper pane.
2. Edit the current query until it reads as follows:

<WILDCARD> *tives and press **Enter**.

¹ Query operators can be entered in upper or lower case. If you wish to search a very specific combination of capitalized or lower case letters, use the **<CASE>** operator. The **STEM** operator can also be used by entering the query term as **<STEM> HEAD, 'HEAD'** or **HEAD**, according to your preference. When quotation marks are used as an alternative, **STEM** searches are denoted by single quotes and **WORD** searches by double quotes. Since TOPIC® defaults to a stem search, a stem search will be automatically performed when there is no specified operator.

² The **WORD** operator can also be used by entering the query term in double quotes, such as **"HEAD"**, without the use of the operator term **WORD**. When quotation marks are used as an alternative, **WORD** searches are denoted by double quotes and **STEM** searches by single quotes.

3. Select the Document group called **1993-1994 Facilities Application** and then the document called **GH-4-92 Volume 3**.
4. Use the **Shift + F9** keys to scroll through the document, viewing all cases that match the search.

Note the number of documents retrieved. This list is different than those obtained in exercises 7 and 8. This search will have retrieved every instance of words with “tives”, as the ending of the word, no matter how the word begins.

AND as a Boolean Search Operator

1. Return to the **Simple Query Editor** by pressing **Esc** and select the Upper pane.
2. Edit the current query until it reads as follows:

MOVIE <AND> DEAD and press **Enter**.¹

This query will search for any document that contains both **MOVIE** and **DEAD** as word stems.

3. Select the Document group called **Blackhorse Pipeline Extension and Associated Facilities** and then the document called **GH-R-1-92 Volume 6**.
4. Use the **Shift + F9** keys to scroll through the document, viewing all cases that match this search.

OR as a Boolean Search Operator

1. Return to the **Simple Query Editor** by pressing **Esc** and select the Upper pane.
2. Edit the current query until it reads as follows:

MOVIE <OR> DEAD and press **Enter**.

This query will search for any document containing the stem **MOVIE** and the stem **DEAD** whether they are in the same document or not. This search is more inclusive and you will notice it has provided a longer Results List than the previous search.

3. Select the Document group called **Blackhorse Pipeline Extension and Associated Facilities** and then the document called **GH-R-1-92 Volume 2**.
4. Use the **Shift + F9** keys to scroll through the document, viewing all cases that match this search.
5. Press **Esc**.
6. Repeat step 4 for the document called **GH-R-1-92 Volume 6**.

¹ To use **AND**, **OR** and/or **NOT** as words to be searched rather than operators you must enclose the word in double quotes such as "AND".

NOT as a Boolean Search Operator

1. Return to the **Simple Query Editor** by pressing **Esc** and select the Upper pane.
2. Edit the current query until it reads as follows:

<WILDCARD> HEAD* <AND> <NOT> HEAD and press **Enter**.

This query will search all documents containing **HEAD** as the beginning of a word, but will exclude all documents that have instances using **HEAD** as a stem. As this is a more exclusive search, you will notice it has provided a much shorter Results List than the previous two searches.

3. Select the Document group called **Blackhorse Pipeline Extension and Associated Facilities** and then the document called **GH-R-1-92 Volume 2**.
4. Use the **Shift + F9** keys to scroll through the document, viewing all cases that match this search.

Using Parentheses to Establish Precedence

1. Return to the **Simple Query Editor** by pressing **Esc** and select the Upper pane.
2. Edit the current query until it reads as follows:

(<WILDCARD> HEAD* <OR> MOVIE) <AND> JEDI

and press **Enter**.

Note the number of documents selected for the Results List. This query performs the **OR** contained in the parentheses first and then will do the **AND**.

3. Edit the query again until it reads as follows:

<WILDCARD> HEAD* <OR> (MOVIE <AND> JEDI)

and press **Enter**.

Note the number of documents selected for the Results List. This time the query does the **AND** contained in the parentheses first and then will do the **OR**.

If you require assistance with more specific questions or problems about the Board Document System, please contact our Help Line at (403) 292-6967.

Chapter 7

Troubleshooting

Keystroke Problems (Dial-in)

Some communication packages intercept TOPIC® commands and process them locally. This occurs when the same keystrokes are interpreted by some communication packages as their own commands.

To avoid this problem, ensure your communication software is configured so that it does not intercept these keyboard commands when in terminal mode.

Modem Problems

Busy signal	Try calling again, all the lines may be busy
Nothing happens	Check the following: <ul style="list-style-type: none">• the modem is on• cables are properly connected
No dial tone	Check the following: <ul style="list-style-type: none">• the phone cable is properly connected• the phone line is working
You receive a Connect message but don't get the login screen	Try the following: <ul style="list-style-type: none">• Press the Enter key or its equivalent to get the system's attention• If that fails, hang up, recheck your modem settings and try again

Login Problems

Error message	Meaning	Action
Login incorrect	You typed the wrong login ID or password.	Try again.
Account already in use	You are already logged in.	Try again. If this continues, someone else may be using your account. Contact the NEB immediately as this may be a Security breach.
Access denied	Your user account may have expired. The BDS does not recognize your login ID.	Call us.
Login timed out	Your session was inactive for too long.	Try again.

Screen Problems

If there are characters on the screen which look strange and unfamiliar, it simply means you need to reset the following:

- Terminal type;
- Modem settings; or
- The Modem speed. The default modem speed is 19,200 Kbs.

To correct the problem, check your modem settings and redial. Make sure that you select a supported terminal type as specified on page 2.

Appendix I

WordPerfect® Character Based (UNIX™) Key Definitions

Table 9
VT100 - Miscellaneous WordPerfect® Functions

Keystroke	Function
PF1,1	Cancel
Ctrl-N	Clear Notification Banner
PF3, PF3, 3	Column Toggle (Regular/Wide Mode)
PF3, PF3, 2	Compose Key
PF3, A	Ctrl-A Substitute Function
PF3, Z	Ctrl-Z Substitute Function
KeyPad". "(Del)	Delete Right Character
PF3, KeyPad1(End)	Delete to End of Line
PF3, KeyPad3(PgDn)	Delete to End of Page
PF3, BackSpace	Delete Word
Esc, Esc	Escape
PF3, KeyPad7(Home)	Go to Page
" _"	Hard Hyphen
PF3, Return	Hard Page
KeyPad7(Home)	Home
PF3, PF3, 1	Keypad Numeric/Application-Mode Toggle

Table 10
VT100 - WordPerfect® 5.1 Function Key Layout

PF4	Thesaurus	Replace	Reveal Codes	Block	Mark Text
PF3	Shell	Spell	Screen	Move	Text In/Out
PF2	Setup	Search<--	Switch	-->Indent<--	Date/Outline
PF1	Cancel	Search-->	Help	Indent-->	List Files
	1	2	3	4	5
PF4	Flush Right	Columns/Tbls	Style	Graphics	Macro
PF3	Tab Align	Footnote	Font	Merge/Sort	Macro Define
PF2	Center	Print	Format	Merge Codes	Retrieve
PF1	Bold	Exit	Underline	End Field	Save
	6	7	8	9	0

Table 11
VT220 and VT320 - Miscellaneous WordPerfect® Functions

Keystroke	Function
F7	Cancel
Ctrl-N	Clear Notification Banner
PF2, 3	Column Toggle (Regular/Wide Mode)
Ctrl-2	Compose Key
PF2, A	Ctrl-A Substitute Function
PF2, Z	Ctrl-Z Substitute Function
Remove	Delete Right Character
PF2, KeyPad1	Delete to End of Line
PF2, NextScrn	Delete to End of Page
PF2, BackSpace	Delete Word
F6	Escape
PF2, PF4	Goto Page
" "	Hard Hyphen
PF2, Return	Hard Page
PF4	Home
PF2, 1	Keypad Numeric/Application-Mode Toggle

Table 12
VT220 and VT320 - WordPerfect® 5.1 Function Key Layout

PF3 PF2 PF1	Escape F6	Thesaurus Shell Setup Cancel F7	Replace Spell Search<-- Search--> F8	Reveal Codes Screen Switch Help F9	Block Move -->Indent<-- Indent--> F10
PF3 PF2 PF1	Mark Text Text In/Out Date/Outline List Files F11	Flush Right Tab Align Center Bold F12	Columns/Tbls Footnote Print Exit F13	Style Font Format Underline F14	Help F15
PF3 PF2 PF1	Macro F16	Graphics Merge/Sort Merge Codes End Field F17	Macro Macro Define Retrieve Save F18	Reveal Codes F19	Block F20

Appendix II

Field Information

Table 13
TOPIC® Field Definitions

Field type	Name	Description	Sample values
Database Fields	Date	Document Publication Date	"9 Mar 94" "940309"
	HearingOrder	NEB hearing order number if applicable	"GH-4-93"
	Notes	Miscellaneous information about the document	"Chapter 4" "Volume 3" "Article" "Report"
	FileNumber	NEB File Number	"3200-J198-1" "4200-T001-8"
	Originator	Individual(s) or organization(s) who wrote the document or originated the hearing request	"TransCanada PipeLines Ltd." "Westcoast Energy Inc." "National Energy Board"
	Title	Document Title	"Application Dated 2 July 1991 for 1992-1993 Facilities"
	DocType	Type of Document	"Hearing Transcript" "Reasons for Decision"
	Doc	Entire Text of the Document	N/A

Appendix III

Operator Quick Reference

Word Search Operators

The following tables list the operators and modifiers that can be combined with words and phrases in a TOPIC® query expression, as appropriate, and provide a brief description of how each is used.

Table 14
Word Search Operators

Operator	Description
WORD	Use the WORD operator to retrieve documents that show evidence of one or more instances of a word you specify. As in: <WORD> senate . Note that you can use the WORD operator in the simple query edit box to force TOPIC® to treat a word as a literal word; by default, TOPIC® treats a word you enter (without an operator) as a stemmed word.
STEM	Use the STEM operator to retrieve documents that show evidence of one or more words having the same stem as the word you specify. By default, TOPIC® treats a word you enter in the simple query edit box as a stemmed word, so you can use this operator when you want to force TOPIC® to treat a word as a stemmed word instead of a topic name.
WILDCARD	Use the WILDCARD operator to retrieve documents that show evidence of one or more words that match a WILDCARD string you specify. As in: <WILDCARD> air* .

Boolean Search Operators

The boolean operators allow words or other search conditions to be combined to make the search more inclusive or exclusive.

Table 15
Boolean Search Operators

Operator	Description
AND	Use the AND operator to retrieve documents that show evidence of all of your search elements. While producing the same results as the ALL operator, this operator also relevance-ranks the retrieved documents. Valid search elements are two or more words (treated as literal or stemmed words), phrases, stems or named topics. As in: Russia <AND> Overseas.
OR	Use the OR operator to retrieve documents that show evidence of at least one of the search elements you specify. The OR operator and the ANY operator produce the same retrieval results given the same search elements; however, if you use the OR operator, TOPIC® relevance-ranks the retrieved documents. Valid search elements are two or more words (treated as literal or stemmed words), phrases, stems or named topics. As in: Russia <OR> Overseas.
NOT	The NOT modifier is used to exclude documents that have evidence of a named topic or word from the Results List. As in: Russia <AND> <NOT> Overseas. Note that you can use the NOT modifier only with the AND and the OR operators. For a simple or form query you can use the NOT modifier by itself, without an operator.

Proximity Search Operators

The following operators can be used to perform a search based on words that are in close proximity in either a phrase, sentence or paragraph. Using these operators, you can specify how close the proximity must be.¹

Table 16
Proximity Search Operators

Operator	Description
PHRASE	Use the PHRASE operator to retrieve documents that show evidence of a phrase you specify. TOPIC® considers a phrase as a grouping of two or more words. Valid search elements are two or more words (treated as literal or stemmed words), phrases or stems. As in: <PHRASE> Canadian market.
SENTENCE	Use the SENTENCE operator to retrieve documents that show evidence of all of the words you specify within the same sentence. Valid search elements are two or more words (treated as literal or stemmed words), phrases or stems. As in: <SENTENCE> (Availability, Canadian market).
PARAGRAPH	Use the PARAGRAPH operator to retrieve documents that show evidence of all of the search elements you specify within the same paragraph. Valid search elements are two or more words (treated as literal or stemmed words), phrases or stems. As in: <PARAGRAPH> (Investors, Canadian market).

¹ When using **AND**, **OR** and/or **NOT** as part of a search phrase, the **AND**, **OR** and/or **NOT** in the phrase must be enclosed in double quotes and the phrase must be enclosed in parentheses.

Fuzzy Search Operators

Fuzzy operators search text for terms, sounds or spellings that are similar to the word(s) used in the search query. They are based on similarities to the specified query rather than exact word matches. Fuzzy search operators are useful if you do not know how to spell part of a query, for example, or if you want to search interrelated subjects.

Table 17
Fuzzy Search Operators

Operator	Description
SOUNDEX	Use the SOUNDEX operator to retrieve documents that show evidence of one or more words that "sound like" a word you specify. As in: <SOUNDEX> preference .
SUGGEST	Use the SUGGEST operator to retrieve documents that contain one or more words in the expanded word list that are statistically-related to the word you specify. TOPIC® calculates statistically-related words based on word occurrences in your document database. For example, when searching a TOPIC® database, the query expression: <SUGGEST> advocate returns documents that contain synonyms such as "proponent," "patron" and "activist."
THESAURUS	Use the THESAURUS operator to retrieve documents that contain one or more words that are synonyms of the word you specify. For example, the TOPIC® query expression: <THESAURUS> negotiation returns documents containing synonyms such as "arbitration," "adjudication" and "debate." The synonyms returned by TOPIC® are based on those defined in the Random House Thesaurus.
TYPO	Use the TYPO operator to retrieve documents that contain one or more words in the expanded word list which exhibit a similar spelling to the word you specify. For example, the TOPIC® query expression: <TYPO> grey returns documents containing the words "grey" and "gray".

Operators Specific to Form Queries

These are relational operators used in performing searches using Form fields.

Table 18
Operators Specific to Form Queries

Operator	Description
CONTAINS	Use the CONTAINS operator to perform a field search over a TOPIC® document database field in a form query template. TOPIC® performs a string match using a value specified in that form query field. This field must be previously defined by your TOPIC® database administrator. When you use this operator, TOPIC® interprets the words stored in a field as individual contiguous units and you may specify one or more of these units as a search value. If you specify multiple words, each word must be separated by a blank space and they must be contiguous.
ENDS	Use the ENDS operator to retrieve documents with fields which end in the search element you specify.
=	Use the = operator to retrieve documents with fields that exactly match the search element you specify.
>	Use the > operator to retrieve documents with fields that are greater than the search element you specify.
>=	Use the >= operator to retrieve documents with fields that are greater than or equal to the search element you specify.
<	Use the < operator to retrieve documents with fields that are less than the search element you specify.
<=	Use the <= operator to retrieve documents with fields that are less than or equal to the search element you specify.
MATCHES	Use the MATCHES operator to retrieve documents with fields which match the WILDCARD expression you specify.
STARTS	Use the STARTS operator to retrieve documents with fields which start with the search element you specify. The STARTS operator is used to define the beginning of a string to be used with a match.
SUBSTRING	Use the SUBSTRING relational operator to retrieve documents with fields including the string you specify anywhere in the field.
THROUGH	Use the THROUGH operator to retrieve documents that are within the range specified by your search elements.

Other Search Operators

Table 19
Other Search Operators

Operator	Description
ACCRUE	Use the ACCRUE operator to retrieve documents that show evidence of any of the search elements you specify. Valid search elements are two or more words (treated as literal or stemmed words), phrases, stems or named topics. As in: <ACCRUE> (Russia, Overseas) .
ALL	Use the ALL operator to retrieve documents that show evidence of all of your search elements. While producing the same retrieval results as the AND operator, this operator does not relevance-rank results. Valid search elements are two or more words (treated as literal or stemmed words), phrases, stems or named topics. As in: <ALL> (Russia, Overseas) .
ANY	Use the ANY operator to retrieve documents which show evidence of at least one of your search elements. While producing the same retrieval results as the OR operator, this operator does not relevance-rank your results. Valid search elements are two or more words (treated as literal or stemmed words), phrases, stems or named topics. As in: <ANY> (Russia, Australia) .
CASE	Use the CASE modifier to do a case sensitive retrieval on a WORD or WILDCARD string, as in: <CASE> <WORD> overseas . Note that you can only use the CASE modifier with the WORD or WILDCARD operators.
MANY	Use the MANY modifier to determine the density of a word or phrase you specify, as in: <MANY> <WORD> senate . The more occurrences of the word or phrase within the document, the higher that document appears in the Results List. The MANY modifier is valid for all operators except AND, OR, ACCRUE, and relational operators.

